

Women's Wellness Connection

Site Visit Process Overview

Overview

Women's Wellness Connection (WWC) staff will conduct site visits at 30% of WWC service delivery agencies each year. The purpose of a WWC site visit is to provide, promote and ensure quality breast and cervical cancer screenings in Colorado at our local agencies by focusing on administrative and management functions and clinical oversight. Site visits serve as an opportunity to highlight program successes, challenges encountered, lessons learned, useful tools and technical assistance needs. The site visit should take approximately three hours to complete. Site visits will be conducted by a clinical WWC staff person (RN or NP) and the program coordinator.

WWC staff members will select agencies to visit annually. This selection will be based on core performance indicators, technical assistance calls, ability to refer women into Medicaid for treatment and attendance to WWC meetings and trainings. For agencies that have multiple sites, WWC staff will work with the WWC Coordinator to select a site that will produce a productive visit.

Joint site visits with American Cancer Society Community Coordinators may also occur.

Steps involved with the visit:

- 1. Coordination and preparation for site visit
- 2. On site visit
- 3 After the site visit
- 4. Six months after site visit

1. Coordination and preparation for site visit

Chart Audit (three weeks prior to visit)

WWC staff will select several WWC client medical charts to be reviewed prior to the visit. Agencies will be provided with WWC ID numbers for 6-10 charts six weeks prior to the visit. In compliance with HIPAA regulations, WWC staff will only review information that pertains to the WWC program. You will NOT need to black out patient names. Please fax required forms to the attention of Kris McCracken at 303-758-3268 https://doi.org/10.1007/ncent/review-nterior to the site visit. The selection of charts to be reviewed will be based on the following criteria:

- Normal cases
- Abnormal cases/complex cases
- Cases where clinical core performance indicators were not met
- Positive cancer cases

Forms required to be sent with each chart include (equivalent forms or electronic medical information may also be sent):

- Chart Audit Checklist (attached to this email)
- WWC Patient History Form
- WWC Consent



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- Signed Affidavit
- WWC Clinical Services Report (if your agency uses this form)
- Client's Medical History If your medical history form includes all of this information, you may send the whole form, if not, you may need to send multiple medical histories or forms from more than one year.
 - Tobacco use assessed at the exam and, if positive, a referral to the QuitLine was provided
 - Client has been asked about a personal history of breast disease or cancer
 - Client has been asked about a family history of breast cancer
 - Assessment was made of the clients current breast symptoms, if any, at the time of exam
 - LMP/menopause status has been assessed
 - DES exposure assessed
 - History of CIN 2/3 or cervical cancer has been assessed
 - o Patient has been assessed for conditions that cause immunocompromisation
 - o Physical exam form which includes clinical breast exam and/or pelvic exam
- Reports All breast screening and diagnostic lab and progress reports including mammograms, ultrasounds, breast biopsy results, Pap results, colposcopy/LEEP results, specialist consults etc. up to the point of cancer diagnosis for the year being reviewed.
- Reports All cervical screening and diagnostic lab and progress reports including Pap results, colposcopy/LEEP results, specialist consults etc. up to the point of cancer diagnosis for the year being reviewed.
- Case management notes these give the "story" of what happened with the client and may include information on phone call attempts, letters sent, contact with the client, what happened after a positive diagnosis was made etc.

Other site visit preparation (two weeks before visit)

Sites will also be asked to submit the following information <u>two weeks</u> prior to the site visit. All of these documents should be emailed to the WWC Program Coordinator (kris.mccracken@state.co.us).

- A completed Site Visit Prep Tool
- Physical description of agency 250 words or less, should answer questions about where clinics are located, number of women served at each clinic, other services provided and number and type of staff.
- Organizational chart if available
- If available, any written policies/procedures that apply to WWC program functions at the agency. Examples may include polices/procedures on follow-up of abnormal results, case management interventions, chain of command, lost to follow-up etc.
- A copy of at least one contract or Memorandum of Understanding with subcontracting agency



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Finalize site visit agenda based on agency needs

2. On site visit

This schedule can be flexible to meet the needs of the agency and those involved with the visit. If possible, WWC requests that a conference room be made available for the visit to accommodate up to three WWC staff members and those involved from the agency in the site visit.

Sample Agenda

- Administrative/Program Management Discussion:
- Physical tour of clinic
- Clinical Process Discussion
- Wrap up

3. After site visit

Final report and cover letter

A WWC staff member will write up a site visit report. This report will be completed and shared with the agency within one month of the site visit. Topics covered on this report will include:

- Summary of site visit
- Agency strengths identified during site visit
- WWC program recommendations for agency
- Action items from site visit
- Summary of site visit that may be shared with WWC Board and Medical Advisory Committee

4. Six months after site visit

About six months after the site visit, a check-in report will be sent to the agency. This report will request information on implementation of recommendations made in the final site visit report.